

State of Hawaii
Department of Human Services
Benefit, Employment & Support Services Division
Employment & Child Care Program Office

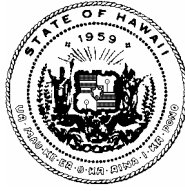
Request for Proposals

RFP No. 903-05-06-KMWH Case Management and Employment Services for Two-Parent Households in West Hawaii, Maui and Kauai

April 4, 2005

Note: If this RFP was downloaded from the State Procurement Office RFP Website each applicant must provide contact information to the RFP contact person for this RFP to be notified of any changes. For your convenience, an [RFP Interest form](#) may be downloaded to your computer, completed and e-mailed or mailed to the RFP contact person. The State shall not be responsible for any missing addenda, attachments or other information regarding the RFP if a proposal is submitted from an incomplete RFP.

LINDA LINGLE
GOVERNOR



LILLIAN B. KOLLER
DIRECTOR
HENRY OLIVA
DEPUTY DIRECTOR

STATE OF HAWAII
DEPARTMENT OF HUMAN SERVICES
P.O. Box 339
Honolulu, Hawaii 96809-0339
April 4, 2005

MEMORANDUM

TO: All Interested Applicants

FROM: Lillian B. Koller, Esq., Director

SUBJECT: **REQUEST FOR PROPOSALS (RFP) – CASE MANAGEMENT AND
EMPLOYMENT SERVICES FOR TWO-PARENT HOUSEHOLDS
IN WEST HAWAII, MAUI AND KAUAI; RFP NO. HMS-903-05-06-
KMWH**

The Department is seeking to purchase the service listed above and further described in the attached RFP. The RFP provides information to assist applicants in the preparation of program plans and budget, including:

1. A description of the service sought;
2. Special requirements to be met by the provider;
3. The criteria by which qualifying proposals shall be reviewed/rated; and
4. The criteria for monitoring and evaluating the contract.

An informational meeting is scheduled for 9:00 A.M. to 11:00 A.M. on Monday, April 11, 2005, at the Kauai Section Office, Dynasty Court, 4473 Pahee St., Ste. G, Lihue, HI 96766; Thursday, April 14, 2005 at the Central Maui Unit, 270 Waiehu Beach Rd., Ste. 107, Wailuku, HI 96793; and Friday, April 15, 2005 at the West Hawaii Section Office, 75-5722 Hanama Pl., Ste. 1105, Kailua-Kona, HI 96740. For more information, please call 586-7060 (Oahu). In order for the proposals to be considered, all applicants are required to submit:

1. One (1) original and three (3) copies of the proposal, delivered to DHS, BESSD, Employment and Child Care Office (ECCPO), at 820 Mililani Street, Haseko Center, Suite 606, Honolulu, HI 96813.
2. Proposals shall be hand-delivered (including courier mail) by 4:30 P.M., Friday, April 29, 2005, to the various DHS offices listed on the Proposal Mail-In and Delivery Information Sheet. ALL MAIL-INS POSTMARKED AFTER 12:00 MIDNIGHT, APRIL 29, 2005, WILL NOT BE ACCEPTED FOR REVIEW AND WILL BE RETURNED. Proposals and materials not requested by DHS will not be accepted for consideration.

PROPOSAL MAIL-IN AND DELIVERY INFORMATION SHEET

NUMBER OF COPIES TO BE SUBMITTED:
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**ALL MAIL-INS MUST BE POSTMARKED BY UNITED STATES POSTAL SERVICE (USPS)
NO LATER THAN
April 29, 2005**

All Mail-ins

Department of Human Services
BESSD Administration Office
Employment and Child Care Program Office
820 Mililani Street, Suite 606
Honolulu, Hawaii 96813

DHS RFP COORDINATOR

Kenneth Nakagawa
For further info. or inquiries

Phone: 586-7060
Fax: 586-5744

**ALL HAND DELIVERIES WILL BE ACCEPTED AT THE FOLLOWING SITES UNTIL 4:30 P.M., Hawaii
Standard Time (HST) April 29, 2005.**

Drop-off Sites

Oahu:

Department of Human Services
BESSD Administration Office
Employment and Child Care Program Office
820 Mililani Street, Suite 606
Honolulu, Hawaii 96813

Maui:

Department of Human Services
Central Maui Unit
Waiehu Beach Center
270 Waiehu Beach Road, Suite 107
Wailuku, Maui

East Hawaii:

Department of Human Services
East Hawaii Section Office
1990 Kinoole Street, Suite 111
Hilo, Hawaii 96720

Kauai:

Department of Human Services
Kauai Section Office
Dynasty Court
4473 Pahee Street, Suite G
Lihue, Kauai

West Hawaii:

Department of Human Services
West Hawaii Section Office
75-5722 Hanama Place, Suite 1105
Kailua-Kona, Hawaii 96740

BE ADVISED: All mail-ins postmarked by USPS after **April 29, 2005**, will be rejected.
Hand deliveries will **not** be accepted after **4:30 p.m., HST, April 29, 2005**.
Deliveries by private mail services such as FEDEX shall be considered hand
deliveries and will not be accepted if received after **4:30 p.m., HST, April 29,
2005**.

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Section 1

Administrative Overview

Section 1

Administrative Overview

Applicants are encouraged to read each section of the RFP thoroughly. While sections such as the administrative overview may appear similar among RFPs, state purchasing agencies may add additional information as applicable. It is the responsibility of the applicant to understand the requirements of *each* RFP.

I. Authority

This RFP is issued under the provisions of the Hawaii Revised Statutes (HRS), Chapter 103F and its administrative rules. All prospective applicants are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective applicant shall constitute admission of such knowledge on the part of such prospective applicant.

II. RFP Organization

This RFP is organized into five sections:

Section 1, Administrative Overview--Provides applicants with an overview of the procurement process.

Section 2, Service Specifications--Provides applicants with a general description of the tasks to be performed, delineates applicant responsibilities, and defines deliverables (as applicable).

Section 3, Proposal Application Instructions--Describes the required format and content for the proposal application.

Section 4, Proposal Evaluation--Describes how proposals will be evaluated by the state purchasing agency.

Section 5, Attachments --Provides applicants with information and forms necessary to complete the application.

III. Contracting Office

The Contracting Office is responsible for overseeing the contract(s) resulting from this RFP, including system operations, fiscal agent operations, and monitoring and assessing provider performance. The Contracting Office is:

Department of Human Services, State of Hawaii
 Benefit, Employment and Child Care Program Office
 Haseko Center, 820 Mililani St., Suite 606
 Honolulu, HI 96813
 Phone (808) 586-7060 Fax: (808) 586-5744

IV. Procurement Timetable

Note that the procurement timetable represents the State's best estimated schedule. Contract start dates may be subject to the issuance of a notice to proceed.

Activity	Scheduled Date
Public notice announcing RFP	<u>4/3/05</u>
Distribution of RFP	<u>4/4/05</u>
RFP orientation sessions	<u>4/11, 4/14, 4/15</u>
Closing date for submission of written questions for written responses	<u>4/19/05</u>
State purchasing agency's response to applicants' written questions	<u>4/21/05</u>
Discussions with applicant prior to proposal submittal deadline (optional)	<u>N/A</u>
Proposal submittal deadline	<u>4/29/05</u>
Discussions with applicant after proposal submittal deadline (optional)	<u>N/A</u>
Final revised proposals (optional)	<u>N/A</u>
Proposal evaluation period	<u>4/30 – 5/5/05</u>
Provider selection	<u>5/6/05</u>
Notice of statement of findings and decision	<u>5/6/05</u>
Contract start date	<u>7/1/05</u>

V. Orientation

An orientation for applicants in reference to the request for proposals will be held as follows:

Date:	<u>April 11, 2005</u>	Time:	<u>9:00 – 11:00am</u>
Location:	<u>Kauai Section Office, 4473 Pahee St., Ste. G, Lihue, Kauai</u>		
Date:	<u>April 14, 2005</u>	Time:	<u>9:00 – 11:00am</u>
Location:	<u>Central Maui Unit, 270 Waiehu Beach Rd., Ste. 107, Wailuku, Maui</u>		
Date:	<u>April 15, 2005</u>	Time:	<u>9:00 – 11:00am</u>
Location:	<u>West Hawaii Section Office, 75-5722 Hanama Place, Ste. 1105, Kailua-Kona, Hawaii</u>		

Applicants are encouraged to submit written questions prior to the orientation. Impromptu questions will be permitted at the orientation and spontaneous

answers provided at the state purchasing agency's discretion. However, answers provided at the orientation are only intended as general direction and may not represent the state purchasing agency's position. Formal official responses will be provided in writing. To ensure a written response, any oral questions should be submitted in writing following the close of the orientation, but no later than the submittal deadline for written questions indicated in the next paragraph (VI. Submission of Questions).

VI. Submission of Questions

Applicants may submit questions to the RFP Contact Person identified in Section 2 of this RFP. All written questions will receive a written response from the state purchasing agency.

Deadline for submission of written questions:

Date: 4/19/05 **Time:** 4:30pm HST

State agency responses to applicant written questions will be provided by:

Date: 4/21/05

VII. Submission of Proposals

A. Forms/Formats - Forms, with the exception of program specific requirements, may be found on the State Procurement Office website at: www.spo.hawaii.gov, click *Procurement of Health and Human Services* and *For Private Providers*. Refer to the Proposal Application Checklist for the location of program specific forms.

- 1. Proposal Application Identification (Form SPO-H-200)** - Provides identification of the proposal.
- 2. Proposal Application Checklist** – Provides applicants with information on where to obtain the required forms; information on program specific requirements; which forms are required and the order in which all components should be assembled and submitted to the state purchasing agency.
- 3. Table of Contents** - A sample table of contents for proposals is located in Section 5, Attachments. This is a sample and meant as a guide. The table of contents may vary depending on the RFP.
- 4. Proposal Application (Form SPO-H-200A)** - Applicant shall submit comprehensive narratives that addresses all of the issues contained in the Proposal Application Instructions, including a cost proposal/budget if required. (Refer to Section 3 of this RFP.)

5. **Registration Form (SPO-H-100A)** – If applicant is not registered with the State Procurement Office (business status), this form must be submitted with the application. If applicant is unsure as to their registration status, they may check the State Procurement Office website at: <http://www.spo.hawaii.gov>, click *Procurement of Health and Human Services*, and *For Private Providers and Provider Lists...The List of Registered Private Providers for Use with the Competitive Method of Procurement* or call the State Procurement Office at (808) 587-4706.
6. **Tax Clearance** – A certified copy of a current valid tax clearance certificate issued by the State of Hawaii, Department of Taxation (DOTAX) and the Internal Revenue Service (IRS) will be required either at the time of proposal submittal or upon notice of award at the discretion of the purchasing agency.

Refer to Section 4, item III.A.1, Administrative Requirements, and the Proposal Application Checklist to see if the tax clearance is required at time of proposal submittal. The tax clearance application may be obtained from the Department of Taxation website at www.hawaii.gov/tax/tax.html.

- B. **Program Specific Requirements** - Additional program specific requirements are included in Sections 2 and/or 3, Service Specifications and the Proposal Application Instructions, as applicable. If Federal and/or State certifications are required, they are listed on the Proposal Application Checklist.
- C. **Multiple or Alternate Proposals** - Multiple or alternate proposals shall not be accepted unless specifically provided for in Section 2 of this RFP. In the event alternate proposals are not accepted and an applicant submits alternate proposals, but clearly indicates a primary proposal, it shall be considered for award as though it were the only proposal submitted by the applicant.
- D. **Proposal Submittal** - Proposals must be postmarked by USPS or hand delivered by the date and time designated on the Proposal Mail-In and Delivery Information Sheet attached to this RFP. Any proposal postmarked or received after the designated date and time shall be rejected. Note that postmarks must be by United States Postal Service or they will be considered hand-delivered and shall be rejected if late. The number of copies required is located on the Proposal Mail-In and Delivery Information Sheet. Only hard copies of proposals shall be accepted.

- E. Wages and Labor Law Compliance** - Before a provider enters into a service contract in excess of \$25,000, the provider shall certify that it complies with section 103-55, HRS, Wages, hours, and working conditions of employees of contractors performing services. Section 103-55, HRS may be obtained from the Hawaii State Legislature website at <http://www.capitol.hawaii.gov/>. Or go directly to: http://www.capitol.hawaii.gov/hrscurrent/Vol02_Ch0046-0115/HRS0103/HRS_0103-0055.htm
- F. Confidential Information** – If an applicant believes any portion of a proposal contains information that should be withheld as confidential, the applicant shall request in writing nondisclosure of designated proprietary data to be confidential and provide justification to support confidentiality. Such data shall accompany the proposal, be clearly marked, and shall be readily separable from the proposal to facilitate eventual public inspection of the non-confidential sections of the proposal.

Note that price is not considered confidential and will not be withheld.

VIII. Discussions with Applicants

- A. Prior to Submittal Deadline.** Discussions may be conducted with potential applicants to promote understanding of the purchasing agency's requirements.
- B. After Proposal Submittal Deadline** - Discussions may be conducted with applicants whose proposals are determined to be reasonably susceptible of being selected for award, but proposals may be accepted without discussions, in accordance section 3-143-403, HAR.

IX. Opening of Proposals

Upon receipt of proposal by a state purchasing agency at a designated location, proposals, modifications to proposals, and withdrawals of proposals shall be date-stamped, and when possible, time-stamped. All documents so received shall be held in a secure place by the state purchasing agency and not examined for evaluation purposes until the submittal deadline.

Procurement files shall be open to public inspection after a contract has been awarded and executed by all parties.

X. Additional Materials and Documentation

Upon request from the state purchasing agency, each applicant shall submit any additional materials and documentation reasonably required by the state purchasing agency in its evaluation of the proposals.

XI. RFP Amendments

The State reserves the right to amend this RFP at any time prior to the closing date for the final revised proposals.

XII. Final Revised Proposals

The applicant's final revised proposal, *as applicable* to this RFP, must be postmarked or hand delivered by the date and time specified by the state purchasing agency. Any final revised proposal post-marked or received after the designated date and time shall be rejected. If a final revised proposal is not submitted, the previous submittal shall be construed as their best and final offer/proposal. *The applicant shall submit **only** the section(s) of the proposal that are amended, along with the Proposal Application Identification Form (SPO-H-200).* After final revised proposals are received, final evaluations will be conducted for an award.

XIII. Cancellation of Request for Proposal

The request for proposal may be canceled and any or all proposals may be rejected in whole or in part, when it is determined to be in the best interests of the State.

XIV. Costs for Proposal Preparation

Any costs incurred by applicants in preparing or submitting a proposal are the applicants' sole responsibility.

XV. Provider Participation in Planning

Provider participation in a state purchasing agency's efforts to plan for or to purchase health and human services prior to the state purchasing agency's release of a request for proposals, including the sharing of information on community needs, best practices, and providers' resources, shall not disqualify providers from submitting proposals if conducted in accordance with sections 3-142-202, 3-142-203 and 3-143-618 of the Hawaii Administrative Rules for Chapter 103F, HRS.

XVI. Rejection of Proposals

The State reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the problems involved and comply with the service specifications. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be rejected without further notice.

A proposal may be automatically rejected for any one or more of the following reasons: (Relevant sections of the Hawaii Administrative Rules for Chapter 103F, HRS, are parenthesized)

- (1) Rejection for failure to cooperate or deal in good faith.
(Section 3-141-201, HAR)
- (2) Rejection for inadequate accounting system. (Section 3-141-202, HAR)
- (3) Late proposals (Section 3-143-603, HAR)
- (4) Inadequate response to request for proposals (Section 3-143-609, HAR)
- (5) Proposal not responsive (Section 3-143-610 (1), HAR)
- (6) Applicant not responsible (Section 3-143-610 (2), HAR)

XVII. Notice of Award

A statement of findings and decision shall be provided to all applicants by mail upon completion of the evaluation of competitive purchase of service proposals.

Any agreement arising out of this solicitation is subject to the approval of the Department of the Attorney General as to form, and to all further approvals, including the approval of the Governor, required by statute, regulation, rule, order or other directive.

No work is to be undertaken by the awardee prior to the contract commencement date. The State of Hawaii is not liable for any costs incurred prior to the official starting date.

XVIII. Protests

Any applicant may file a protest against the awarding of the contract. The Notice of Protest form, SPO-H-801, is available on the SPO website (see the Proposal Application Checklist in Section 5 of this RFP. Only the following matters may be protested:

- (1) A state purchasing agency's failure to follow procedures established by Chapter 103F of the Hawaii Revised Statutes;
- (2) A state purchasing agency's failure to follow any rule established by Chapter 103F of the Hawaii Revised Statutes; and
- (3) A state purchasing agency's failure to follow any procedure, requirement, or evaluation criterion in a request for proposals issued by the state purchasing agency.

The Notice of Protest shall be mailed by USPS or hand delivered to the head of the state purchasing agency conducting the protested procurement and the procurement officer who is conducting the procurement (as indicated below) within five working days of the postmark of the Notice of Findings and Decision sent to the protestor. Delivery services other than USPS shall be considered hand deliveries and considered submitted on the date of actual receipt by the state purchasing agency.

Head of State Purchasing Agency	Procurement Officer
Lillian B. Koller, Esq.	Edwin Igarashi
Director	Procurement Officer
P.O. Box 339	P.O. Box 339
Honolulu, HI 96809-0339	Honolulu, HI 96809-0339

XIX. Availability of Funds

The award of a contract and any allowed renewal or extension thereof, is subject to allotments made by the Director of Finance, State of Hawaii, pursuant to Chapter 37, HRS, and subject to the availability of State and/or Federal funds.

XX. Monitoring and Evaluation

The criteria by which the performance of the contract will be monitored and evaluated are:

- (1) Performance/Outcome Measures
- (2) Output Measures
- (3) Quality of Care/Quality of Services
- (4) Financial Management
- (5) Administrative Requirements

XXI. General and Special Conditions of Contract

The general conditions that will be imposed contractually are on the SPO website. (See Section 5, Proposal Application Checklist for the address). Special conditions may also be imposed contractually by the state purchasing agency, as deemed necessary.

XXII. Cost Principles

In order to promote uniform purchasing practices among state purchasing agencies procuring health and human services under Chapter 103F, HRS, state purchasing agencies will utilize standard cost principles outlined in Form SPO-H-201 which is available on the SPO website (see section 5, the Proposal Application Checklist). Nothing in this section shall be construed to create an exemption from any cost principle arising under federal law.

Section 2

Service Specifications

Section 2

Service Specifications

I. Introduction

A. Overview, purpose or need

The State of Hawaii, Department of Human Services, Benefit, Employment & Support Services Division (BESSD) is requesting proposals from qualified applicants to provide employment and support services for needy two-parent families in Hilo. In general, these adults will be from First-to-Work (FTW) two-parent households. A two-parent household is defined by FTW as a household where two adults live together and have at least one child in common. The clients must meet work performance requirements required under Welfare Reform and progress towards self-sufficiency; pursuant to Public Law 104-193, "Personal Responsibility and Work Opportunity Reconciliation Act of 1996" (PRWORA). The term TAONF (Temporary Assistance to Other Needy Families) may be used interchangeably with "two-parent households" in this RFP and subsequent documents.

Services may include, but are not limited to pre-employment training, job development, job placement, providing supportive services, and monitoring and tracking of the client until they are employed and/or self-sufficient. One (1) contract will be awarded under this request for proposals.

B. Description of the goals of the service

The goal of this project is to serve a monthly average of 160-240 or more active clients and to place a minimum of 60% or more into countable federally defined work activities. This will be further described in section III, scope of work.

C. Description of the target population to be served

The populations to be served are the able-bodied adults who receive state funded Temporary Assistance to Other Needy Families (TAONF). The Department reserves the right to change the target population, based on future service needs, after affording the Provider 30 days notice, for the duration of this contract and any Supplemental Agreement(s).

D. Geographic coverage of service

The area to be served is described as the islands of Kauai (census tracts 401-409.99), Maui (census tracts 301-315.99) and Hawaii (census tracts 212-218.99 which includes North and South Kona, North and South Kohala, and

Kau. The Department reserves the right to re-assign census tracts, based on service needs, after affording the Provider 30 days notice, for the duration of this contract and any Supplemental Agreement(s).

E. Probable funding amounts, source, and period of availability

This contract is expected to be State funded. The Department reserves the right to change the funding amounts and source, based on future service needs, after affording the Provider 30 days notice, for the duration of this contract and any Supplemental Agreement(s). The maximum amount of funding for this contract for FY 2006-2007 is \$202,400.00 for Kauai, \$210,100 for Maui, and \$278,300 for West Hawaii. These amounts include potential 10% performance bonuses added to the following base operating costs: \$184,000 for Kauai, \$191,000 for Maui, and \$253,000 for West Hawaii.

II. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

The applicant shall comply with the Chapter 103F, HRS Cost Principles for Purchases of Health and Human Services identified in SPO-H-201 (Effective 10/1/98), which can be found on the SPO website (See Section 5, POS Proposal Checklist, for the website address.)

B. Secondary purchaser participation

(Refer to §3-143-608, HAR)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases: None.

C. Multiple or alternate proposals

(Refer to §3-143-605, HAR)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded

(Refer to §3-143-206, HAR)

☒ Single ☐ Multiple ☐ Single & Multiple

E. Single or multi-term contracts to be awarded

(Refer to §3-149-302, HAR)

☐ Single term (≤ 2 yrs) ☒ Multi-term (> 2 yrs.)

An initial term contract (twelve months), with the option of three (3) twelve month extensions subject to availability of funds and contractor performance, shall be awarded.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider or providers. Written questions should be submitted to the RFP contact person and received on or before the day and time specified in Section I, Item IV (Procurement Timetable) of this RFP.

Kenneth Nakagawa, (808) 586-7060

III. Scope of Work

The scope of work encompasses the following tasks and responsibilities:

A. Service Activities

1. To provide case management services to TAONF clients referred by the Department. The caseload standard for each case manager shall be 80 clients. Case management includes but is not limited to placement of the client into approved activities, providing support services if needed, and providing general advice and moral support to the client as he/she seeks employment and/or training.
2. To provide intake and orientation to new clients each month and to close out active clients according to established case closure guidelines until an average of 160 clients per month is achieved and maintained for Kauai and Maui. For West Hawaii, an average caseload of 240 clients per month is expected.
3. To place a minimum of 60% of all clients active in the unit in any given month in federally defined work activities for an average of 32 hours per week. This performance rate shall be calculated for each fiscal year. The average caseload for the unit shall be calculated for each fiscal year. Together, these two numbers will determine whether the Provider shall qualify for consideration of the performance bonus. Refer to page 2-5 for federally defined work activities. In order to determine a monthly threshold based on 32 hours per week, 32 hours is multiplied by 4.33, thus giving 138.56 hours per month or 139 hours. This monthly threshold of 139 hours shall serve as the basis for calculating the performance rate of a client in any given month.

SCOPE OF SERVICES:

1. **Intake/Orientation:** Obtaining basic information on the client and familiarizing the client with the roles and responsibilities of the Provider and the participant. Intake will be conducted in accord with Department Policy. Intake shall be done until the contractor has averaged the required unit capacity of 160 for Kauai and Maui and 240 for West Hawaii.
2. **Assessment:** The Provider shall assess the client to determine if there are any barriers to employment. The Provider shall determine whether the client is able to obtain and maintain employment, or whether the client needs to be referred to another agency for further assessment. Assessment shall also include English and Math testing, using test materials supplied by the Department.
3. **Pre-Employment Training:** The Provider shall provide for specific, formal training of 28+ hours in duration. The curriculum shall include self-awareness, self-esteem building, resume writing, job search techniques, resources, networking, interviewing techniques, how to complete job applications and other such topics required by the participants to begin productive activities toward their self-sufficiency.
4. **Case Management:** Monitor and track the client's progress toward self-sufficiency. The monitoring and tracking will include addressing barriers to employment and developing a specific employment plan. The worker shall also follow up monthly (at minimal) with the client to assure that the client continues to participate with required activities and obtain appropriate verifications from the client to that effect.
5. **Support Services:** Support services for child care, transportation reimbursement and work related expenses will be available to support the clients through the Department. These services will have to be coordinated with the Division's units. Skill building, vocational training and education will be allowed under the terms of this contract, but with the understanding that *no Department funding is available to support TAONF clients' educational expenses.*
6. **Client exit:** A client shall exit the program when paid employment exceeds the income standards for TAONF eligibility. Cases meeting this criterion will result in the case being closed by the client's eligibility worker.
7. **Transitional Health and Child Care:** Once client earnings exceed the income earnings limits set under the financial assistance program, they enter into the transitional benefit phase. The Provider shall coordinate transitional child care through the appropriate office within the Department.

OTHER REQUIREMENTS:

1. **Definition of Work:** Work-mandatory TAONF adults served, not directly involved in Skill Building components, will be expected to participate 32 hours per week in a work activity or combination thereof as defined by the Federal Government. The definition of work is provided under Public Law 104-193, section 407 (d) "Work Activities Defined." These activities are:
 1. Unsubsidized Employment;
 2. Subsidized Private Sector Employment;
 3. Subsidized Public Sector Employment;
 4. Work Experience;
 5. On-the-Job Training;
 6. Job Search and Job Readiness Assistance (not to exceed 240 hours);
 7. Community Service Programs;
 8. The Provision of Child Care Services to an individual who is participating in a community service program.

As stated in item 3 under "Scope of Services", contractors should be aware that the Department will not provide structured Job Readiness training. Therefore, proposals should include a specific provision to directly provide the service.

2. **Performance Requirements:** As an encouragement to contractors to perform, up to a 10% bonus in funding will be available, provided that certain performance achievements are met. There also may be up to a 10% penalty imposed if certain participation requirements are not met. Please note that the bonuses and penalties will be based on the total annual expenditure amount reported to the Department and *not* on the total allocated contract amount. A satisfactory client is one who is participating in 32 hours per week and 139 hours per month.

Bonus/Penalty. The bonus and penalty structure shall be:

10% Bonus = 95-100% Satisfactory Participation
 8% Bonus = 90-94% Satisfactory Participation
 6% Bonus = 85-89% Satisfactory Participation
 4% Bonus = 80-84% Satisfactory Participation
 2% Bonus = 75-79 % Satisfactory Participation

10% Penalty = 0-39% Satisfactory Participation
 8% Penalty = 40-44% Satisfactory Participation
 6% Penalty = 45-49% Satisfactory Participation
 4% Penalty = 50-54% Satisfactory Participation
 2% Penalty = 55-59% Satisfactory Participation

B. Management Requirements (Minimum and/or mandatory requirements)**1. Personnel**

For Kauai and Maui: The Provider shall maintain as a minimum, the following staff: One (1) unit supervisor, one (1) secretary, two (2) case managers.

For West Hawaii: The Provider shall maintain as a minimum, the following staff: One (1) unit supervisor, one (1) secretary, three (3) case managers.

Please note that the unit supervisor's responsibilities shall include social work functions (e.g. barrier assessments, conciliation process, etc.) and 20-40% of his/her time shall be spent of such activities. Unit supervisors and case managers shall have baccalaureate degrees in order to meet the minimum qualification for employment consideration.

2. Administrative

Hours of Operation: Normal hours of operation shall be 7:45 a.m. to 4:30 p.m., excluding State of Hawaii holidays.

Division Procedures: The Provider shall follow Procedures established by BESSD regarding 1) support services for child care, transportation, and work related expenses, 2) transitional health and child care, 3) case closures, 4) monitoring and tracking of participation, and 5) reporting of all data related to clients and client participation, conciliation and sanction. Additionally, an official Branch Report shall be prepared by the Provider in the event of a Fair Hearing Request received by a client.

Execution of Contract: The successful applicant will be required to enter into a formal written Contract with the Department in accordance with the laws, rules and regulations of the State of Hawaii.

The stated requirements appearing elsewhere in this RFP shall become part of the terms and conditions of the resulting Contract. Any deviations therefrom must be specifically defined by the applicant in its proposal which, if successful, will become part of the Contract.

The funds available for this project are limited. The Department reserves the rights to contract for only those services which appear to be in the best interests of the Department.

The Department reserves the right to cancel the Contract without cause and to request new proposals for the work. Upon award of the work, the Department will forward the formal Contract to the successful offeror for

execution. The Contract shall be signed by the successful offeror and returned, together with required insurance documents (including indemnification), and other supporting documents, within ten (10) calendar days after receipt by the offeror, or within such further time as the Director may allow.

No such Contract shall be binding upon the Department until the Contract has been fully and properly executed by all the parties thereto and the State Comptroller has, in accordance with Section 103-39, Hawaii Revised Statutes, endorsed thereon his certificate that there is an appropriation or balance of an appropriation over and above all outstanding contracts, sufficient to cover the amount required by the Contract during the fiscal year. Further, the Contract shall not be considered to be fully executed until the Department of the Attorney General of the State of Hawaii has approved the Contract as to form.

No Supplementary Agreement shall be binding upon the Department until the Agreement has been fully and properly executed by all parties thereto prior to the start date of Agreement. The PROVIDER shall not provide any services until the Agreement is fully and properly executed.

Any work performed by the successful offeror prior to receipt of a Notice to Proceed shall be at the offeror's own risk and expense. The State of Hawaii and the Department are not and will not be liable for any work, contract costs, expenses, loss of profits or damages whatsoever incurred by the successful offeror prior to the receipt of a Notice to Proceed.

The **Special Conditions**, including but not limited to the following, shall be incorporated in the Agreement:

a. Purchase of Equipment, Furniture, Supplies and Telecom Request

- 1) The PROVIDER shall get prior approval for the initial purchase of equipment, furniture, supplies, etc. which are required for this Contract. Subsequent purchases of equipment (that has a useful life of more than one year) shall require prior approval.
- 2) The PROVIDER shall transfer possession of equipment, furniture and supplies purchased by the Department upon termination of the Contract.
- 3) The PROVIDER shall submit a telecom request to install or de-install any server, computers and printer related equipment, and telecommunication.

b. Liability Insurance

Notwithstanding the “General Conditions” for all 103F-procured contracts where section 1.4 addresses the liability insurance in a combined amount of at least ONE MILLION AND NO/100 DOLLARS (\$1,000,000.00), the Department of Human Services requires that the PROVIDER obtain, maintain, and keep in force, throughout the period of this Agreement, liability insurance (the “Liability Insurance”) issued by an insurance company in a combined amount of at least TWO MILLION AND NO/100 DOLLARS (\$2,000,000.00), or such lesser amount requested in writing by the PROVIDER, and, for good cause shown, approved by the head of the purchasing agency, which approval, if any, is incorporated herein by reference, for bodily injury and property damage liability arising out of each occurrence. The PROVIDER’S Liability Insurance shall indicate that the State of Hawaii is an additional insured with respect to its policy provisions and, therefore, cover any liability arising out of or resulting from occurrences connected with the PROVIDER’S performance under the Agreement. Prior to, or upon execution of the Agreement, the PROVIDER shall obtain a certificate of insurance verifying the existence of the necessary liability insurance coverage in the amount stated above. If the scheduled expiration date of the liability insurance policy is earlier than the expiration date of the time of performance under the Agreement, the PROVIDER, upon renewal of the policy, shall promptly cause to be provided to the State of Hawaii an updated certificate of insurance. The certificates of insurance shall expressly provide that the insurance policy shall not be cancelled unless the insurance company has first given to the State of Hawaii thirty (30) calendar days’ written notice of the intended cancellation.

3. Quality assurance and evaluation specifications

The contract shall be evaluated based upon performance as described herein this section and discussed above. The contract will also be reviewed for overall cost effectiveness based upon the overall cost compared to the performance outcome.

4. Output and performance/outcome measurements

The performance of the Provider shall be measured by the specifications described as follows:

- a. To provide all referrals an orientation to services and job readiness workshop;
- b. To develop an Employment Plan within 15 days of completion of Intake and Assessment sessions;

- c. To progress clients into job placement, replacement with higher paying employment or employment that will result in the client's loss of TAONF due to excess income;
- d. To assist clients with identified barriers to employment with barrier removal and eventual placement into gainful employment in accordance with their Employment Plan;
- e. To meet or exceed a client performance rate of 60%.

5. Experience

The Provider shall demonstrate a thorough understanding of the purpose and scope of the service activity, as well as the necessary skills, abilities, and knowledge of, and experience relating to the delivery of the proposed services.

6. Coordination of services

PROVIDER staff shall comply with all appropriate federal and state laws, rules and regulations, and policies and procedures governing the State run, federally funded work programs for TAONF recipients. The Department shall provide training on all relevant policies and procedures, including the Hawaii Automated Network Assistance (HANA) System.

The PROVIDER shall keep records to document information acquired about the recipients or given or made available by the recipients served under this Agreement. All such information shall be considered confidential and shall not be disclosed by the PROVIDER except as otherwise allowed by Hawaii Revised Statute §346-10, and Hawaii Administrative Rules §17-601, and only after prior written notification to DHS.

The PROVIDER shall insure the security and confidentiality of any and all data and/or information maintained on State electronic data processing equipment including but not limited to the HANA system.

7. Reporting requirements for program and fiscal data

The Provider shall enter client data and payment information at a computer terminal to be designated for the Provider. Monthly reports shall be prepared and submitted to the Department. While manual reports may be submitted, the computer entries shall be the official report and serve as one source for program evaluation. All data must be entered in a timely manner as the Provider will not receive any credit for client performance if these entries are not entered. All computer entries shall be

supported by documentary evidence filed in the client's case record. At the Department's discretion, manual audits of case records may be performed to validate computer reports. In the event of discrepancies, the Department shall make the final determination of which data system (computer or audit-based, or a combination thereof) will be used to determine performance compliance. *Please take note that the "General Conditions" section of all Health and Human Services Contracts (section 1.6) requires a "Final Report" to the State of Hawaii pertinent to the Compensation and Payment Schedule of the finalized contract.*

8. Pricing structure or pricing methodology to be used

This is a cost reimbursement Contract. The cost reimbursement pricing structure reflects a Purchase of Services Agreement in which the State agency pays the PROVIDER for actual base operating costs incurred in delivering the services specified in the Contract, up to a stated maximum obligation. The State agency will also pay the employers wage subsidies as described in Subsection III, Scope of Work.

PROVIDER is limited to fifteen percent (15%) in indirect expenses or administrative costs. For-profit corporations will not be allowed to charge any fixed fee or profit as part of their budget or expenditure plan.

The funds appropriated for the purchase of this services includes a provision for leasing of rental space, purchase of furniture, cellular telephones, and general office supplies and equipment.

See RFP Section 3, Item V for details regarding Pricing Structure.

9. Units of service and unit rate

Not applicable.

IV. Facilities

If the Provider does not already have existing facilities, the Provider is expected to enter into a lease arrangement for the procurement of adequate office space which can house their staff, equipment and the necessary data communication infrastructure for the HANA system.

Section 3

Proposal Application Instructions

Section 3

Proposal Application Instructions

General instructions for completing applications:

- *Proposal Applications shall be submitted to the state purchasing agency using the prescribed format outlined in this section.*
- *The numerical outline for the application, the titles/subtitles, and the applicant organization and RFP identification information on the top right hand corner of each page should be retained. The instructions for each section however may be omitted.*
- *Page numbering of the Proposal Application should be consecutive, beginning with page one and continuing through for each section. **See sample table of Contents***
- *Proposals may be submitted in a three ring binder (Optional).*
- *Tabbing of sections (Recommended).*
- *Applicants must also include a Table of Contents with the Proposal Application. A sample format is reflected in Section 5, Attachment B of this RFP.*
- *A written response is required for **each** item unless indicated otherwise. Failure to answer any of the items will impact upon an applicant's score.*
- *Applicants are **strongly** encouraged to review evaluation criteria in Section 4, Proposal Evaluation when completing the proposal.*
- *This form (SPO-H-200A) is available on the SPO website (for the website address see the Proposal Application Checklist in Section 5, Attachments). However, the form will not include items specific to each RFP. If using the website form, the applicant must include all items listed in this section.*

The Proposal Application comprises the following sections:

- *Proposal Application Identification Form*
- *Table of Contents*
- *Program Overview*
- *Experience and Capability*
- *Project Organization and Staffing*
- *Service Delivery*
- *Financial*
- *Other*

I. Program Overview

Applicant shall give a brief overview to orient evaluators as to the program/services being offered.

II. Experience and Capability

A. Necessary Skills

The applicant shall demonstrate that it has the necessary skills, abilities, and knowledge relating to the delivery of the proposed services.

B. Experience

The applicant shall provide a description of projects/contracts pertinent to the proposed services.

C. Quality Assurance and Evaluation

The applicant shall describe its own plans for quality assurance and evaluation for the proposed services, including methodology.

D. Coordination of Services

The applicant shall demonstrate the capability to coordinate services with other agencies and resources in the community.

E. Facilities

The applicant shall provide a description of its facilities and demonstrate its adequacy in relation to the proposed services. If facilities are not presently available, describe plans to secure facilities. Also describe how the facilities meet ADA requirements, as applicable and special equipment that may be required for the services.

III. Project Organization and Staffing

A. Staffing

1. Proposed Staffing

The applicant shall describe the proposed staffing pattern, client/staff ratio and proposed caseload capacity appropriate for the viability of the services. (Refer to the personnel requirements in the Service Specifications, as applicable.)

2. Staff Qualifications

The applicant shall provide the minimum qualifications (including experience) for staff assigned to the program. (Refer to the qualifications in the Service Specifications, as applicable)

B. Project Organization

1. Supervision and Training

The applicant shall describe its ability to supervise, train and provide administrative direction relative to the delivery of the proposed services.

2. Organization Chart

The applicant shall reflect the position of each staff and line of responsibility/supervision. (Include position title, name and full time equivalency) Both the “Organization-wide” and “Program” organization charts shall be attached to the Proposal Application.

IV. Service Delivery

Applicant shall include a detailed discussion of the applicant’s approach to applicable service activities and management requirements from Section 2, Item III. - Scope of Work, including (if indicated) a work plan of all service activities and tasks to be completed, related work assignments/responsibilities and timelines/schedules.

V. Financial

A. Pricing Structure

Applicant shall submit a cost proposal utilizing the pricing structure designated by the state purchasing agency. The cost proposal shall be attached to the Proposal Application.

Pricing Structure Based on Cost Reimbursement

The cost reimbursement pricing structure reflects a purchase arrangement in which the State pays the contractor for budgeted costs that are actually incurred in delivering the services specified in the contract, up to a stated maximum obligation.

The purchasing agency shall consider cost proposals based on “cost type” or “pure reimbursement” pricing structure from the applicants’ who are non-profit organizations licensed to do business in State of Hawaii. “Cost-type” involves payment of all incurred costs within a predetermined total estimated cost.

The purchasing agency shall consider cost proposals based on “cost-plus-fixed-fee” from the applicants who are for-profit organizations licensed to do business in State of Hawaii. “Cost-plus-fixed-fee” allows for payment of all incurred costs within a predetermined amount plus an agreed upon fee which will not change. **We anticipate these fees to be limited to 10% or less of the**

contract award. Also, these fees need to be built within the contract ceiling. *Please note*, however, that the Department reserves the right to negotiate the final amount of fixed fee within the limits discussed above.

All budget forms, instructions and samples are located on the SPO website (see the Proposal Application Checklist in Section 5 for website address). The following budget form(s) shall be submitted with the Proposal Application:

SPO-H-205 Budget
 SPO-H-206A Personnel – Salaries & Wages
 SPO-H-206B Personnel – Payroll Taxes and Fringe Benefits
 SPO-H-206C Travel – Inter-Island
 SPO-H-206D Travel – Out-of-State*
 SPO-H-206E Contractual Services – Administration
 SPO-H-206F Contractual Services – Subcontracts
 SPO-H-206G Indirect Costs
 SPO-H-206H Other Costs
 SPO-H-206I Equipment Purchases*

*Expenditures require justification and prior approval

B. Other Financial Related Materials

1. Accounting System

In order to determine the adequacy of the applicant's accounting system as described under the administrative rules, the following documents are requested as part of the Proposal Application (may be attached):

Most recent Audit Report.

2. Tax Clearance Certificate (Form A-6)

An original or certified copy of a current (within 3 months), valid Clearance Certificate issued by the Hawaii State Department of Taxation (DOTAX) and the Internal Revenue Service (IRS) shall be submitted by the contract execution date. The two-part Tax Clearance Application (Form A-6) that combines DOTAX and IRS tax clearance shall be used for this purpose.

VI. Other

A. Litigation

The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgment. If applicable, please explain.

Section 4

Proposal Evaluation

Section 4

Proposal Evaluation

I. Introduction

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly and impartially. Structural, quantitative scoring techniques will be utilized to maximize the objectivity of the evaluation.

II. Evaluation Process

The procurement officer or an evaluation committee of designated reviewers selected by the head of the state purchasing agency or procurement officer shall review and evaluate proposals. When an evaluation committee is utilized, the committee will be comprised of individuals with experience in, knowledge of, and program responsibility for program service and financing.

The evaluation will be conducted in three phases as follows:

- Phase 1 - Evaluation of Proposal Requirements
- Phase 2 - Evaluation of Proposal Application
- Phase 3 - Recommendation for Award

Evaluation Categories and Thresholds

<u>Evaluation Categories</u>		<u>Possible Points</u>
<i>Administrative Requirements</i>		
<i>Proposal Application</i>		100 Points
Program Overview	0 points	
Experience and Capability	20 points	
Project Organization and Staffing	15 points	
Service Delivery	55 points	
Financial	10 Points	
TOTAL POSSIBLE POINTS		100 Points

III. Evaluation Criteria

A. Phase 1 - Evaluation of Proposal Requirements

1. Administrative Requirements

- Proposal Application Checklist
- Registration with State Procurement Office
- Audit Report (most recent)

2. Proposal Application Requirements

- Proposal Application Identification Form (Form SPO-H-200)
- Table of Contents
- Program Overview
- Experience and Capability
- Project Organization and Staffing
- Service Delivery
- Financial (All required forms and documents)
- Program Specific Requirements (as applicable)

B. Phase 2 - Evaluation of Proposal Application (100 Points)

Program Overview: No points are assigned to Program Overview. The intent is to give the applicant an opportunity to orient evaluators as to the service(s) being offered.

1. *Experience and Capability (20 Points)*

The State will evaluate the applicant's experience and capability relevant to the proposal contract, which shall include:

A. Necessary Skills

- Demonstrated skills, abilities, and knowledge relating to the delivery of the proposed services.
- Demonstrated a thorough understanding of the purpose and scope of the service activity.
- Described how the proposed service is designed to meet the pertinent issues and problems related to the service activity.

B. Experience

- Explain your relevant experiences dealing with State of Hawaii contracts relating to the delivery of the proposed services during the last 5 years.

C. Quality Assurance and Evaluation

- Sufficiency of quality assurance and evaluation plans for the proposed services, including methodology.

D. Coordination of Services

- Demonstrated capability to coordinate services with other agencies and resources in the community.

E. Facilities

- Adequacy of facilities relative to the proposed services.

2. *Project Organization and Staffing (15 Points)*

The State will evaluate the applicant's overall staffing approach to the service that shall include:

A. *Staffing*

- Proposed Staffing: That the proposed staffing pattern, client/staff ratio, and proposed caseload capacity is reasonable to insure viability of the services.
- Staff Qualifications: Minimum qualifications (including experience) for staff assigned to the program.

B. Project Organization

- Supervision and Training: Demonstrated ability to supervise, train and provide administrative direction to staff relative to the delivery of the proposed services.
- Organization Chart: Approach and rationale for the structure, functions, and staffing of the proposed organization for the overall service activity and tasks.

3. Service Delivery (55 Points)

Evaluation criteria for this section will assess the applicant's approach to the service activities and management requirements outlined in the Proposal Application.

The evaluation criteria may also include an assessment of the logic of the work plan for the major service activities and tasks to be completed, including clarity in work assignments and responsibilities, and the realism of the timelines and schedules, as applicable.

- Describe the overall program content and design.
- Demonstrate a clear understanding of the target group.
- Demonstrate an understanding of the various service activities and sequence of events.
- Presents evidence of cooperation and collaboration, and willingness to follow Department requirements, policies and established procedures.
- Demonstrates knowledge of case documentation and maintenance. Include any experience with electronic case record maintenance as utilized in computer systems.
- Demonstrates knowledge of handling customer service demands and complaints.
- Provides for public relations and community collaboration.
- The evaluation criteria may also include an assessment of the logic of the work plan for the major service activities and tasks to be completed, including clarity in work assignments and responsibilities, and the realism of the timelines and schedules, as applicable.
- Describes staff/management activities.

4. *Financial (10 Points)*

- Personnel costs are reasonable and comparable to positions in the community.
- Non-personnel costs are reasonable and adequately justified.
- To what extent does the budget support the scope of service of this RFP?
- Adequacy of accounting system.

C. Phase 3 - Recommendation for Award

Each notice of award shall contain a statement of findings and decision for the award or non-award of the contract to each applicant.

Section 5

Attachments

- A. Proposal Application Checklist
- B. Sample Table of Contents
- C.

Proposal Application Checklist

Applicant: _____

RFP No.: HMS-903-05-06-KMWH

The applicant's proposal must contain the following components in the order shown below. This checklist must be signed, dated and returned to the state purchasing agency as part of the Proposal Application. *SPO-H forms are located on the web at <http://www.spo.hawaii.gov> Click *Procurement of Health and Human Services* and *For Private Providers*.*

Item	Reference in RFP	Format/Instructions Provided	Required by Purchasing Agency	Completed by Applicant
General:				
Proposal Application Identification Form (SPO-H-200)	Section 1, RFP	SPO Website*	X	
Proposal Application Checklist	Section 1, RFP	Attachment A	X	
Table of Contents	Section 5, RFP	Section 5, RFP	X	
Proposal Application (SPO-H-200A)	Section 3, RFP	SPO Website*	X	
Registration Form (SPO-H-100A)	Section 1, RFP	SPO Website*	(Required if not Registered)	
Tax Clearance Certificate (Form A-6)	Section 1, RFP	Dept. of Taxation Website (Link on SPO website)*	X	
Cost Proposal (Budget)				
SPO-H-205	Section 3, RFP	SPO Website*	X	
SPO-H-205A	Section 3, RFP	SPO Website* Special Instructions is applicable, Section 5		
SPO-H-205B	Section 3, RFP,	SPO Website* Special Instructions, Section 5		
SPO-H-206A	Section 3, RFP	SPO Website*	X	
SPO-H-206B	Section 3, RFP	SPO Website*	X	
SPO-H-206C	Section 3, RFP	SPO Website*	X	
SPO-H-206D	Section 3, RFP	SPO Website*	X	
SPO-H-206E	Section 3, RFP	SPO Website*	X	
SPO-H-206F	Section 3, RFP	SPO Website*	X	
SPO-H-206G	Section 3, RFP	SPO Website*	X	
SPO-H-206H	Section 3, RFP	SPO Website*	X	
SPO-H-206I	Section 3, RFP	SPO Website*	X	
SPO-H-206J	Section 3, RFP	SPO Website*		
Certifications:				
Federal Certifications		Section 5, RFP		
Debarment & Suspension		Section 5, RFP		
Drug Free Workplace		Section 5, RFP		
Lobbying		Section 5, RFP		
Program Fraud Civil Remedies Act		Section 5, RFP		
Environmental Tobacco Smoke		Section 5, RFP		
Program Specific Requirements:				
Audit Report	Section 3, RFP		X	
Organization Chart	Section 3, RFP		X	

Authorized Signature

Date

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